SessionWorks Judge Edition

Quick Start

PREPARE CASES FOR A COURT SESSION

SELECT A DAY FOR A LIST OF SESSIONS

1. Scroll calendar **months** to desired month.

Scheduled sessions

Current day

Selected day

To scroll: Flick fingertip over calendar area.

2. Tap a **day** to view its scheduled sessions.

The view changes to Day View.

Home - Action View

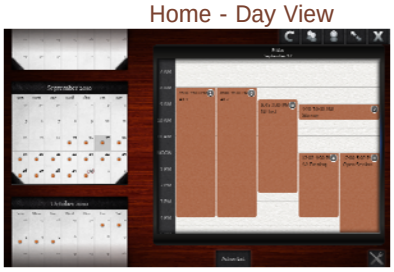
SELECT A SESSION

Day View shows sessions that have a case in the Ready folder.

- Tap a **session** to open it.

The Session Manager opens with the cases scheduled for the selected session.

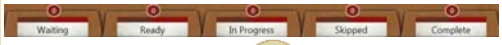
Home - Day View



ORGANIZE CASES INTO FOLDERS

Scheduled cases begin in the **Not Processed** folder.

Organize each case into a folder to reflect how you want to conduct your court session.



1. Tap **Case Control** to open its **Action menu** .
2. Tap **Set Status** .
3. Tap the **button** of the destination folder.

Session Manager

- Tap a **folder** to view the cases in that status.

moves a selected case directly into the Ready folder.

OPEN A CASE

Follow the appropriate method, and refer to the other pages for facts and instructions for working a case.

♦**Start Court** icon

1. Tap **Start Court**.
2. Work the current case.
3. After working the current case, tap

Mark Complete and the next case in the Ready folder opens automatically.

♦**View Case** on Action menu

1. Tap **Case Control** for the case.
2. Tap **View Case** on Action menu.

3. After working the current case, tap **Mark Complete**.
4. Select the next case or folder to work.

Case View

Copyright © 2012 Tyler Technologies, Inc. All rights reserved

SessionWorks Judge Edition

Quick Start

Work an Open Case

Case Details

Provides key information about the case:

- Case type
- Case number
- Parties involved
- Lead attorney

Case Summary Information

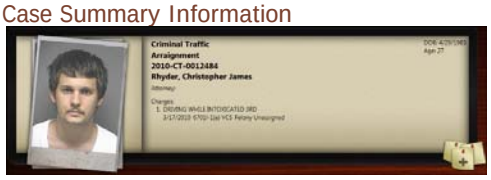


Table of Contents (TOC)

Review documents attached to a case:

1. Scroll through **Favorites** and/or other attached **documents**.
2. Tap the **document** to open in Viewer.

Documents attached to a case list in the TOC.

Viewer: One Page

Review the selected document; mark pages; add notes.

Refer to Viewer Document Controls instructions on the back page.

To zoom and pan, use either method:

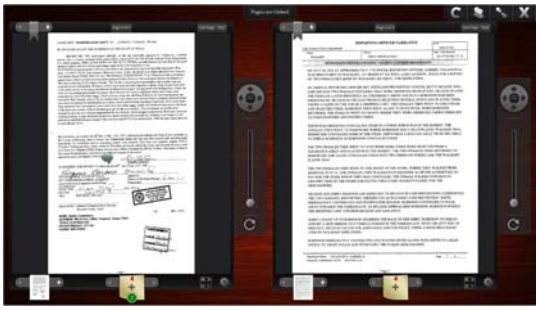
- Pinch and spread on document.
- Use the Zoom/Pan/Rotate control.

- To open same document in both viewers, tap **Two Page**.

- To open the Register of Actions, tap **Case File**.

Viewer: Two Page

- To enable each Viewer to function independently of the other, tap **Unlink**.



- To return to One Page view, tap **One Page**.

- To open a different document, go to the TOC; tap **TOC** if needed.

TIPS

Quick Add of Case Note

- Tap to open the case notepad.

Bookmarks

Mark pages of interest with Bookmarks.

1. Scroll to a page; tap to open the bookmarks bar; tap any color.

2. Tap an arrow to move to the next or previous bookmark in a document.

1. Tap to open the Go to Page pad.

2. Tap the number of the page to open in the Viewer.

TIPS

Case Details is configurable by case category. Ask your administrator.

TOC

Favorites pane and the pane below it scroll independently.

- Tap **Favorites** label to hide or show this pane.

Gear

opens control to zoom/pan/rotate document.

Page Note

- Tap to open and add text to page note.

Multiple Notes

Number in the green disc states the number of notes on the page.

Copyright © 2012 Tyler Technologies, Inc. All rights reserved

SessionWorks Judge Edition

Quick Start

NOTES: CASE, DOCUMENT, PAGE

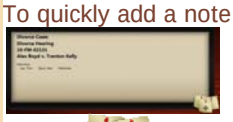
TIPS

Note Types
✚Case
✚Page

Multiple Notes
Number in the green disc states the number of notes on the case.

ADD A CASE NOTE

To quickly add a note to the open case:

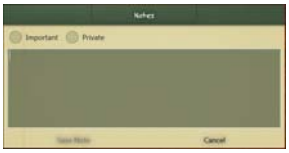


1. Tap on the Case Summary to open the notepad for a case note.

2. Type note **text**.
3. Set an option if appropriate.
4. Tap **Save Note**.

OPTIONS FOR ALL NOTE TYPES

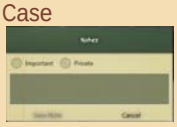
- **Private** note is viewable only by its author.
- **Important** note serves as a call for action: When its case opens, the note list opens with unacknowledged (red), important notes at the top of the list.



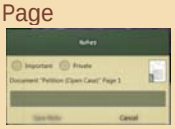
- **Judge Edition** note (*no option setting)* is viewable by Judge Edition users.

TIPS

Notepads
Case



Page

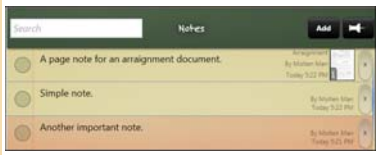


Undock / Move / Dock Note List
Note list undock and dock:
1. Tap **tack** at top of note list to undock.
2. Drag note list to anywhere.
3. **Tap** blue oval **X** on note list to dock.

ADD NOTES FROM CASE NAV PANE

1. Tap the **Notes** icon on the Case Nav.

The list of the notes on the case opens.

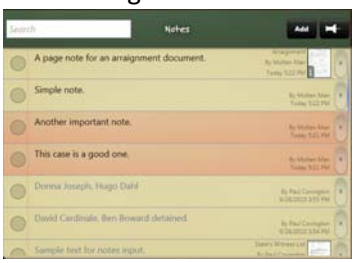


2. Tap the **Add** button to open Add bar.

3. Tap the appropriate **button** to open its notepad.
4. Type note **text**; set an option.
5. Tap **Save Note**.

ACKNOWLEDGE A NOTE

On the note list, mark a note as (worked) acknowledged.



- Tap the **circle** at the left of an entry to acknowledge the note; this sets a check mark within the circle.

Important acknowledged notes change background color and no longer appear at the top of the note list when their case opens.

TIPS

Open a Note
- Tap **document** icon to open its note.

Size Undocked Note
- Drag dotted triangle in lower right corner.

Page Note Marker

Flags the area to which a note applies.

1. Drag **marker** to desired location.
2. Tap **marker** to display note text.

ADD A PAGE NOTE

For a one-page document or the page open in the Viewer:

1. Move page-to-page to a specific page:
   Tap a directional **arrow**
2. Tap to open the notepad.
3. Type **text**; set an option.
4. Tap **Save Note**.

DELETE NOTE

1. Tap oval **X** button.

2. Tap the **Delete** button.

The deleted entry is no longer in the note list.

TIPS

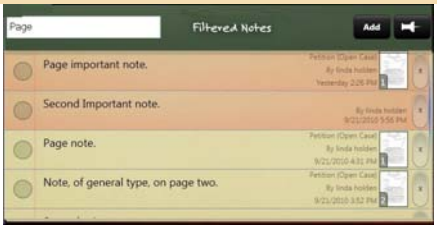
Filtered Notes
header states that the list is a partial list of all the entries that exist.

SEARCH FOR A NOTE

Provide the text to find within existing notes.

- Type the **text** in the white text box.

The result is a filtered list of the notes that match the search text.



- Tap **Clear** for a complete list of all notes.

SessionWorks Judge Edition

Quick Start

Touch Gestures

Select
Tap

List Scroll
Flick

Brush surface with fingertip

Page Scroll
Vertical

Horizontal

Move Object
Drag

Zoom In/Out
Pinch/Spread

Go to Page
Page 2 of 4 opens the Go to Page pad.

1. Tap the number of the page to view.
2. Tap Enter.

Navigation and Controls

Navigate Cases
Based on action, icons become active or inactive in the Case Nav.

Action on a Case
1. Tap **Case Control** to open the Action menu.
2. Tap the **action** to apply.
3. Tap **X** to close the menu.

Group Selected Cases
Group cases with Paperclip.

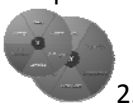
1. Tap each **individual case** to select. Each selected case is highlighted.
2. Tap the **Case Control** of one of the selected cases.
3. Tap **Paperclip** on the Action menu.

Ungroup cases with Unpaperclip.

Move Case Position within a Folder
1. Tap **Move** on the Action menu.
2. Tap section labeled with desired direction.

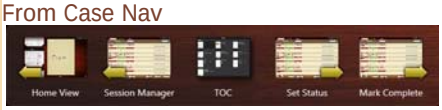
Place Case into Another Folder
From Action menu

1. Tap **Set Status** on the Action menu.



2. Tap the **destination** folder.

From Case Nav



1. Tap **Set Status**.

2. Tap the button of the **destination** folder.

Search for a Case
Provide the text by which to locate a case, using either method:

- From drop-down lists, select appropriate **values** for filtering cases during search.
- Type **text** in search field to match against case contents.

Retrieve a Non-Scheduled Case
Provide the number of the case to retrieve from Odyssey.

1. Type the Odyssey **Case Number**.

2. Tap ***WALK IN***.

If found, an entry for that case number appears in Session Manager list of cases.

One Page & Two Page Viewer Controls
One Page

- To open the same document in both viewers, tap **Two Page**.
- To enable each viewer to function independently of the other, tap **Unlink**.

Two Page

- To return to One Page view, tap **One Page**.

Viewer: Document Controls
Doc Opens

- Tap **gear** to open Zoom/Pan/Rotate control.
- Move **slider** first to zoom, then tap pan arrows.

- Tap **arrow** to go to next/previous note.
- Tap **tack** to add note.

- Tap **arrow** to go to next/previous page.

Keyboard

Navigate using Touch Gestures and/or mouse and keyboard

Previous page
Left Arrow / Page Up

Next page
Right Arrow / Page Down

Last page
End

First page
Start

Full-screen toggle F11

Session Manager
Focus on Find field
Ctrl + F

Case View
Add Case Note
F2

Add Page Note
(displayed page or left pane) F3

Two Page Case View
Add Page Note
(left pane) F3

Add Page Note
(right pane)
Shift + F3

Copyright © 2012 Tyler Technologies, Inc. All rights reserved